

Fig. 1

37

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41

43

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Internet Portal.com (personalized page)

Search	Server Name	User Name	Password
Agent	LBC.com	John Doe	XXXXXXX
Last	My Bank.com	John R. Doe	XXXXXX
Update	My Stocks.com	John R. Doe	XXXXXXXXXX
ADD	My Shopping.com	Jane L. Doe	XXXXXXX
	Mortgage.Com	John/Jane Doe	XXXXXXXXXX
	Airline.com	John Doe	XXXXXXX

Search String 51

52

Fig. 2

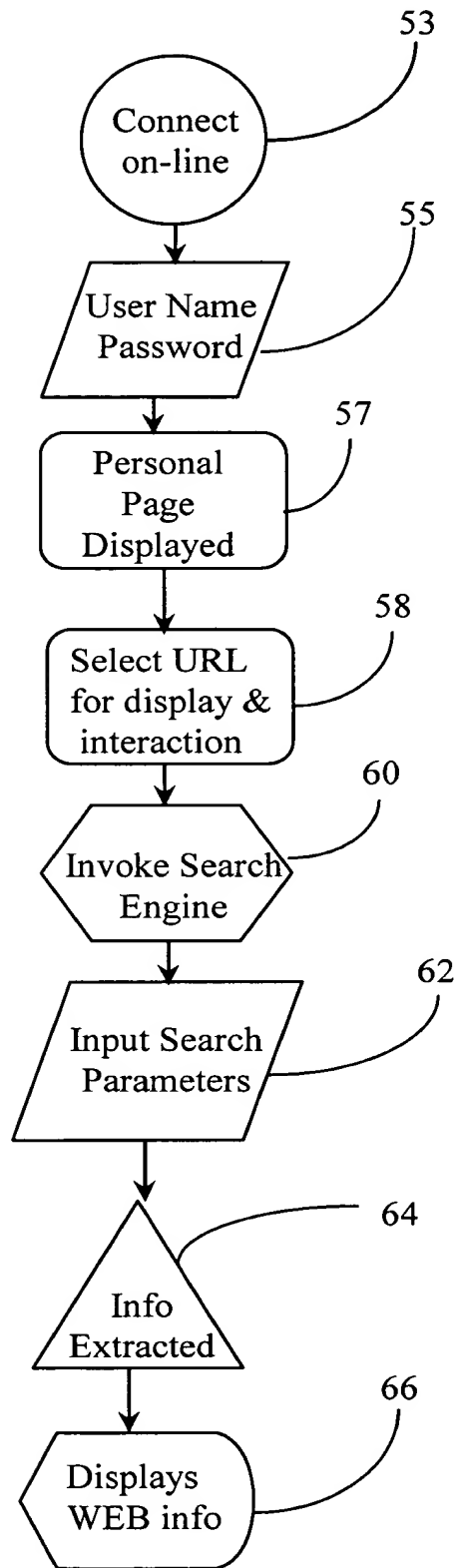


Fig. 3

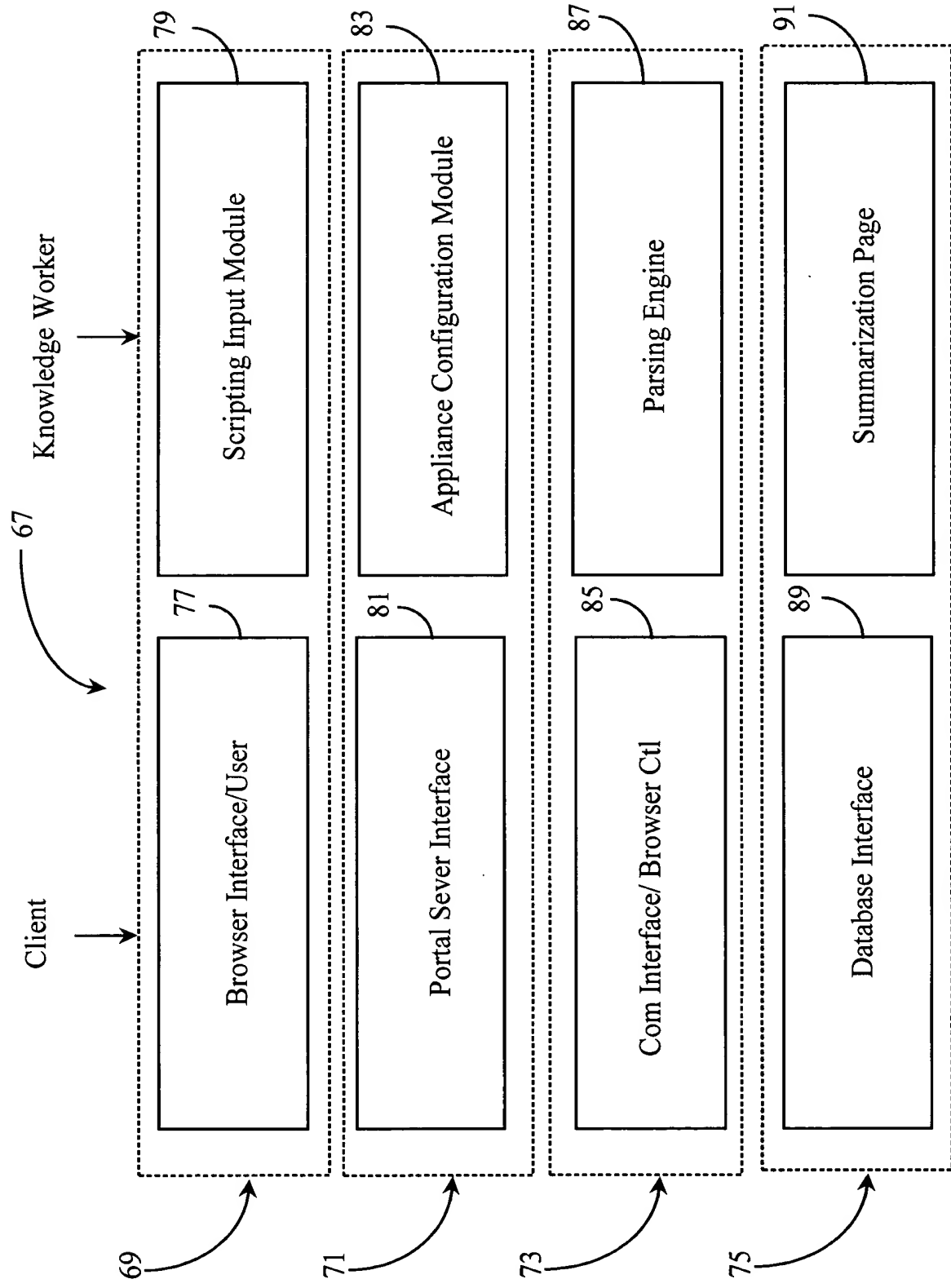


Fig. 4

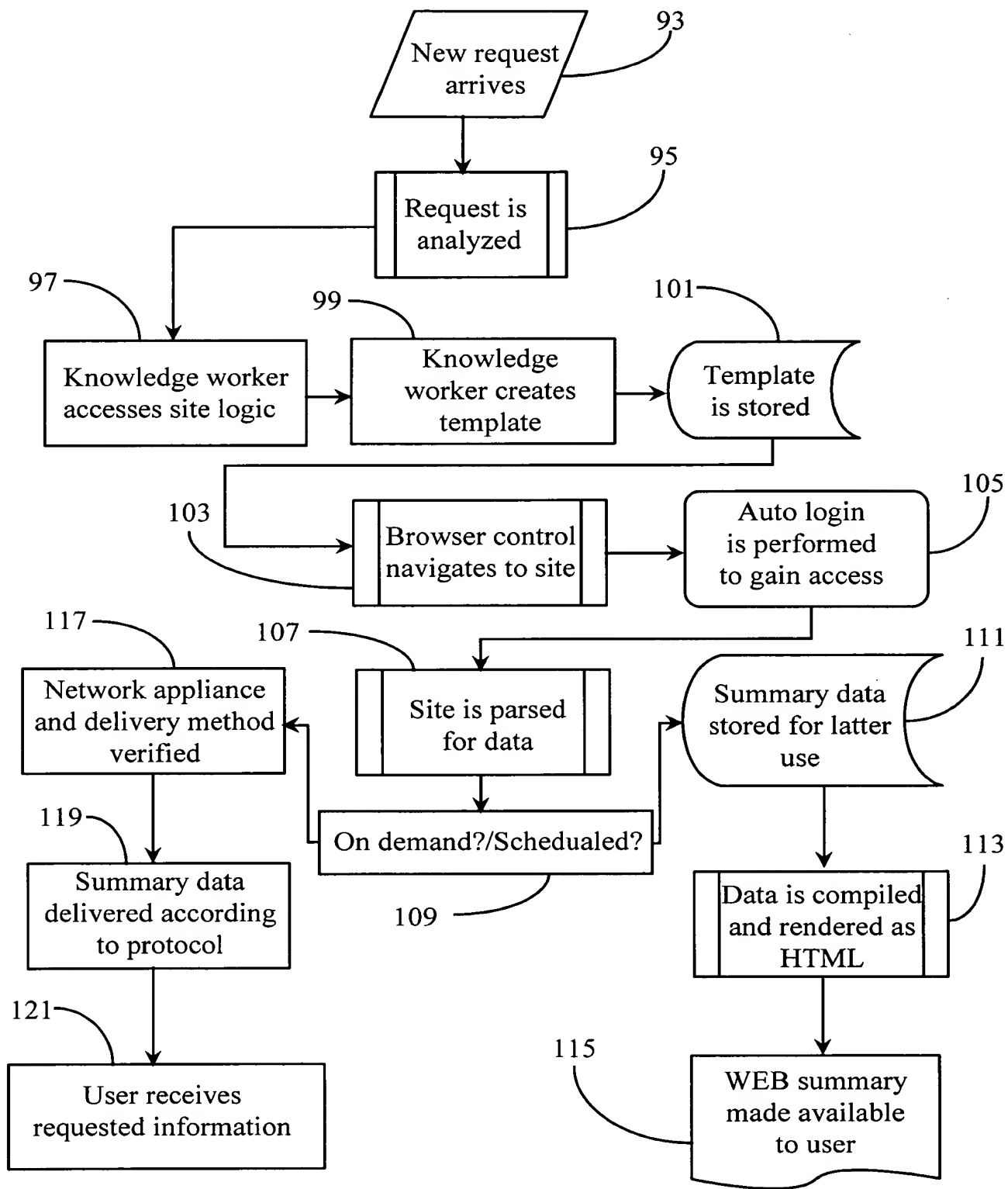


Fig. 5

FIG. 6

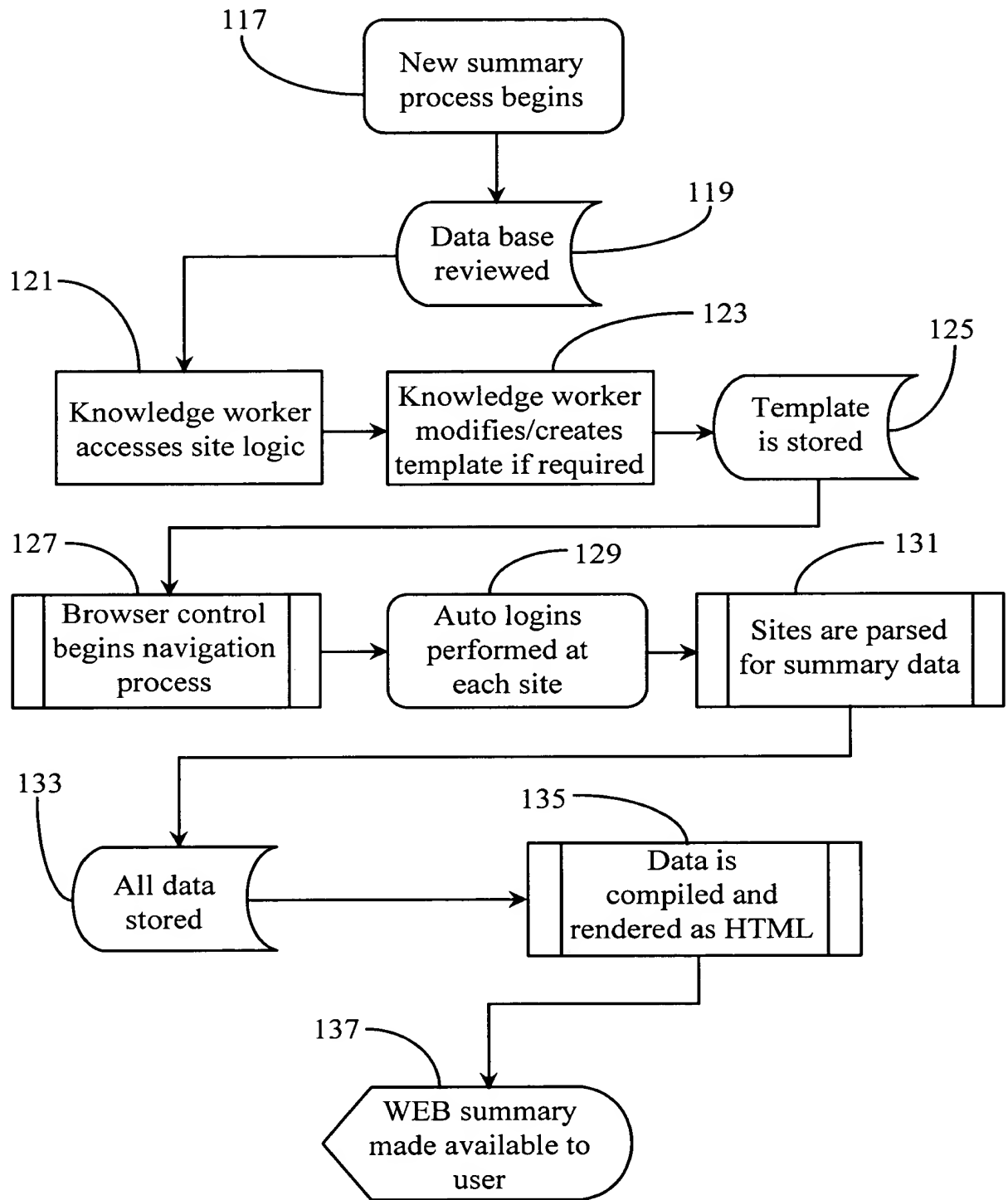


Fig. 6

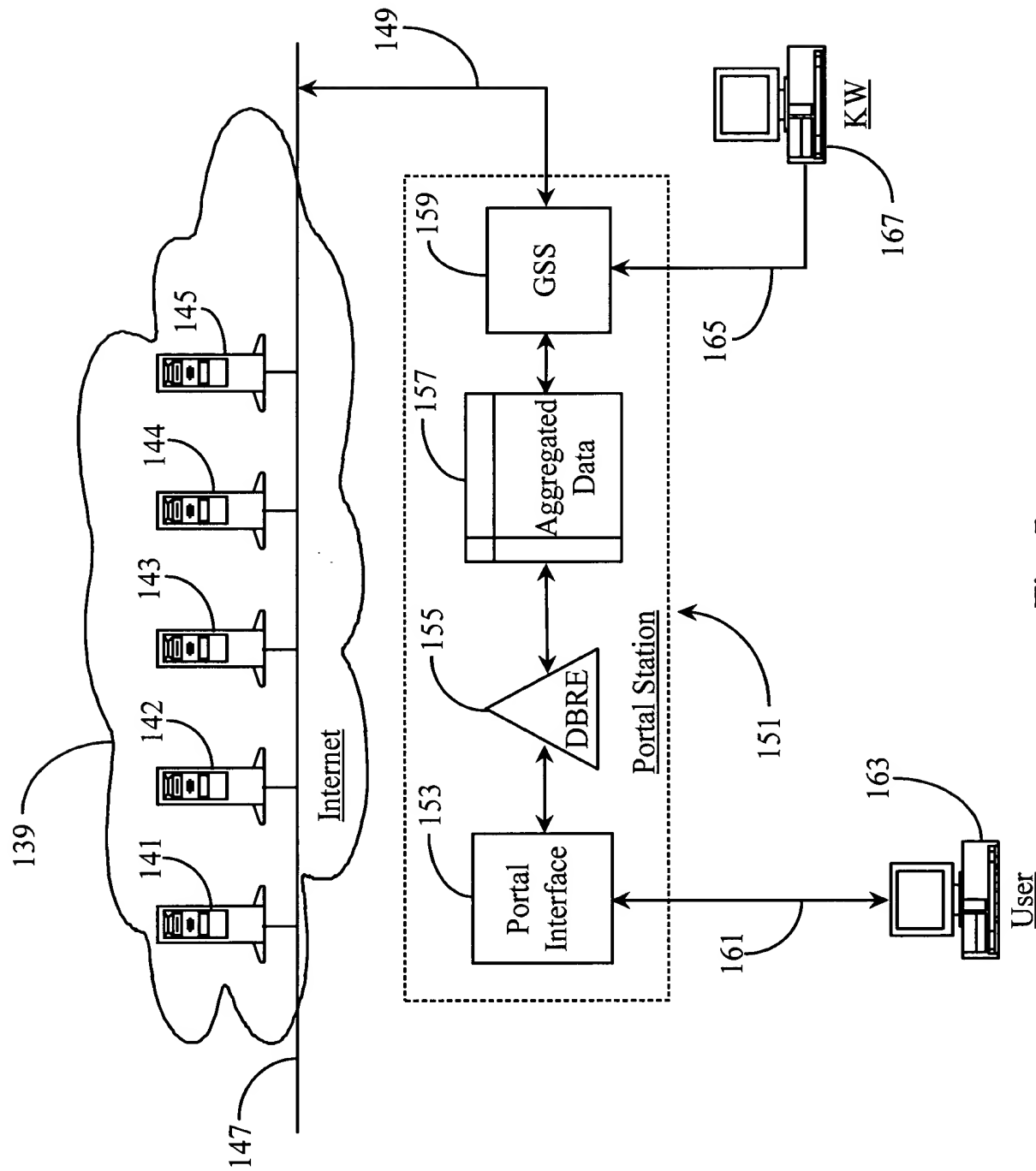


Fig. 7

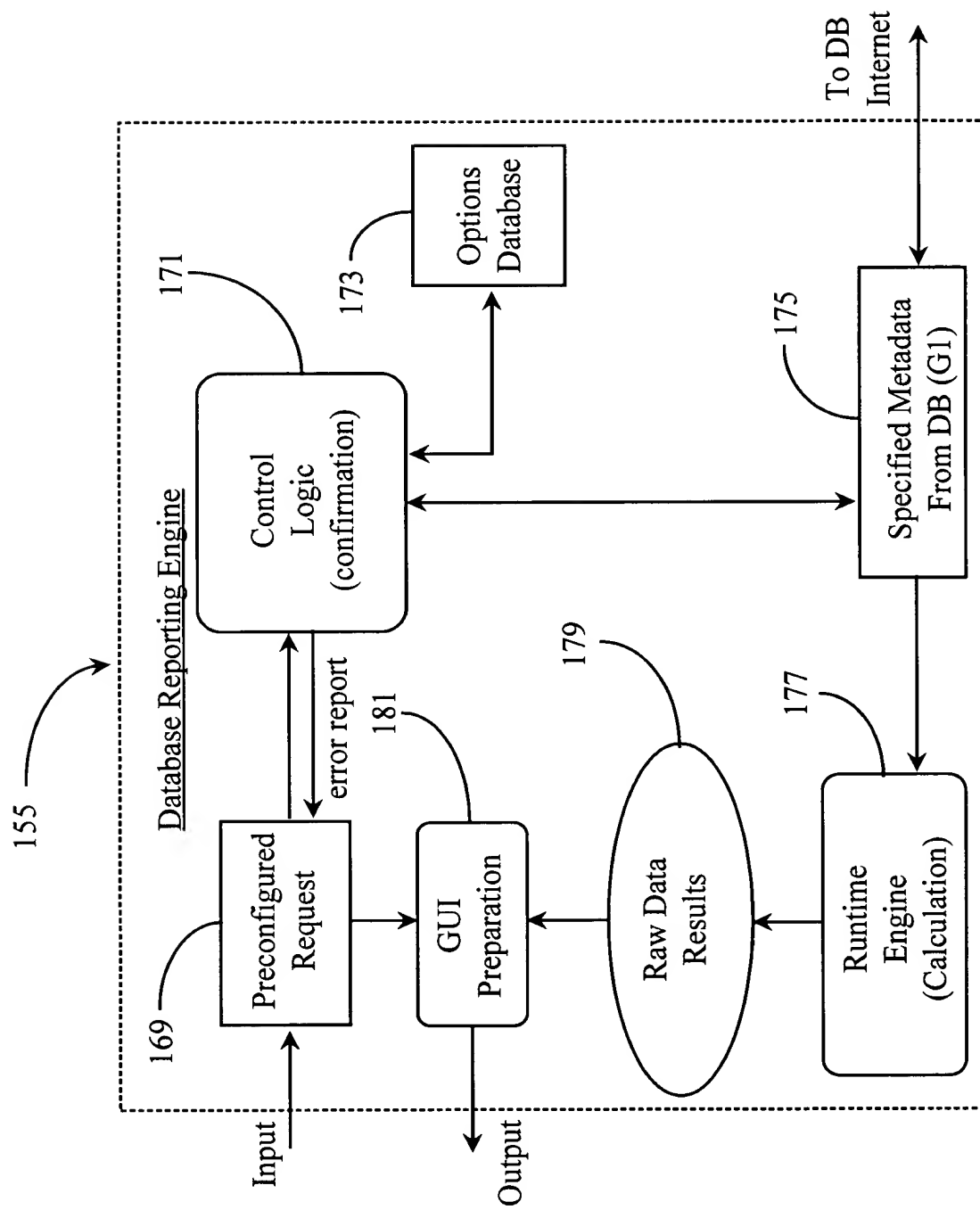


Fig. 8

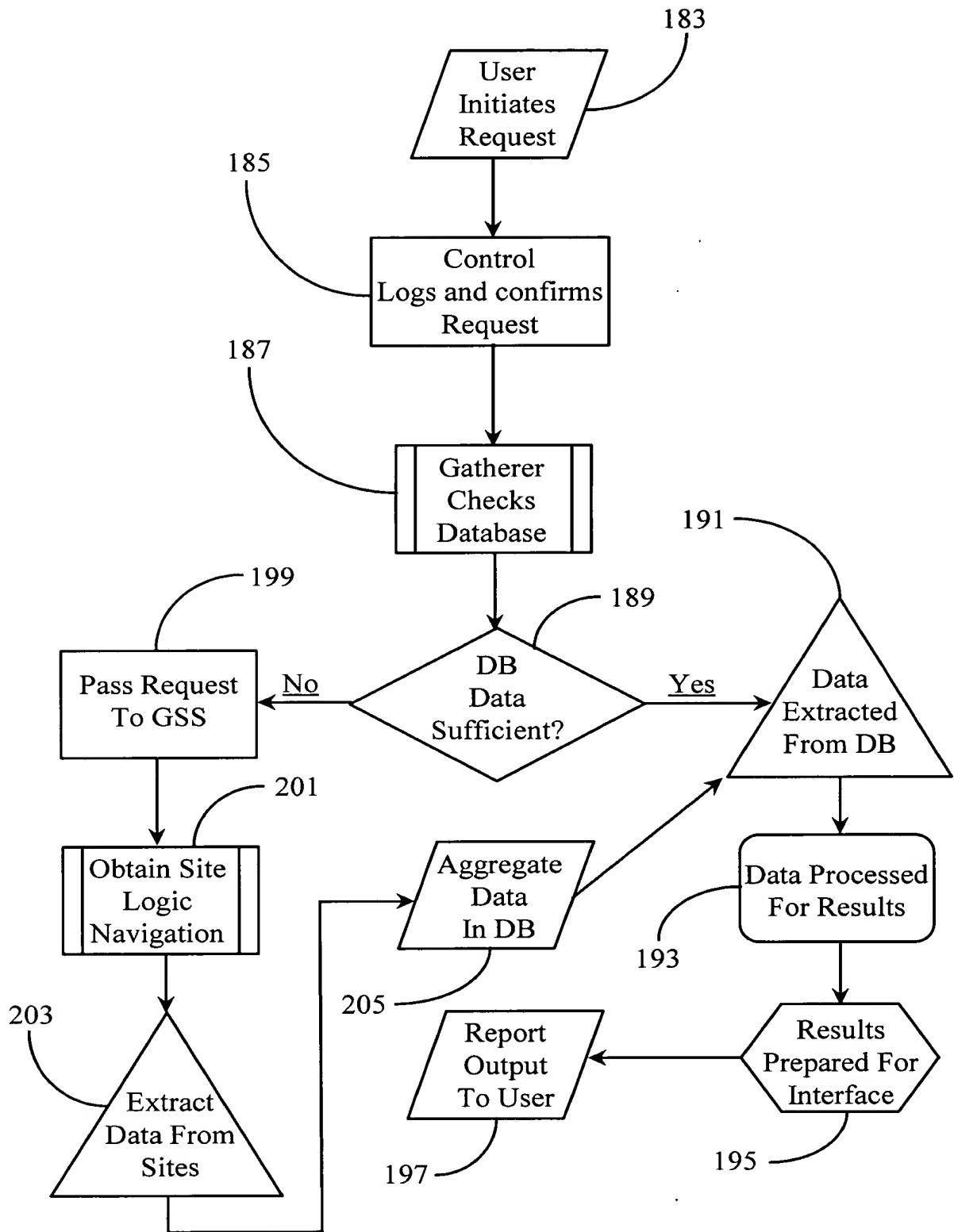


Fig. 9



Fig. 10

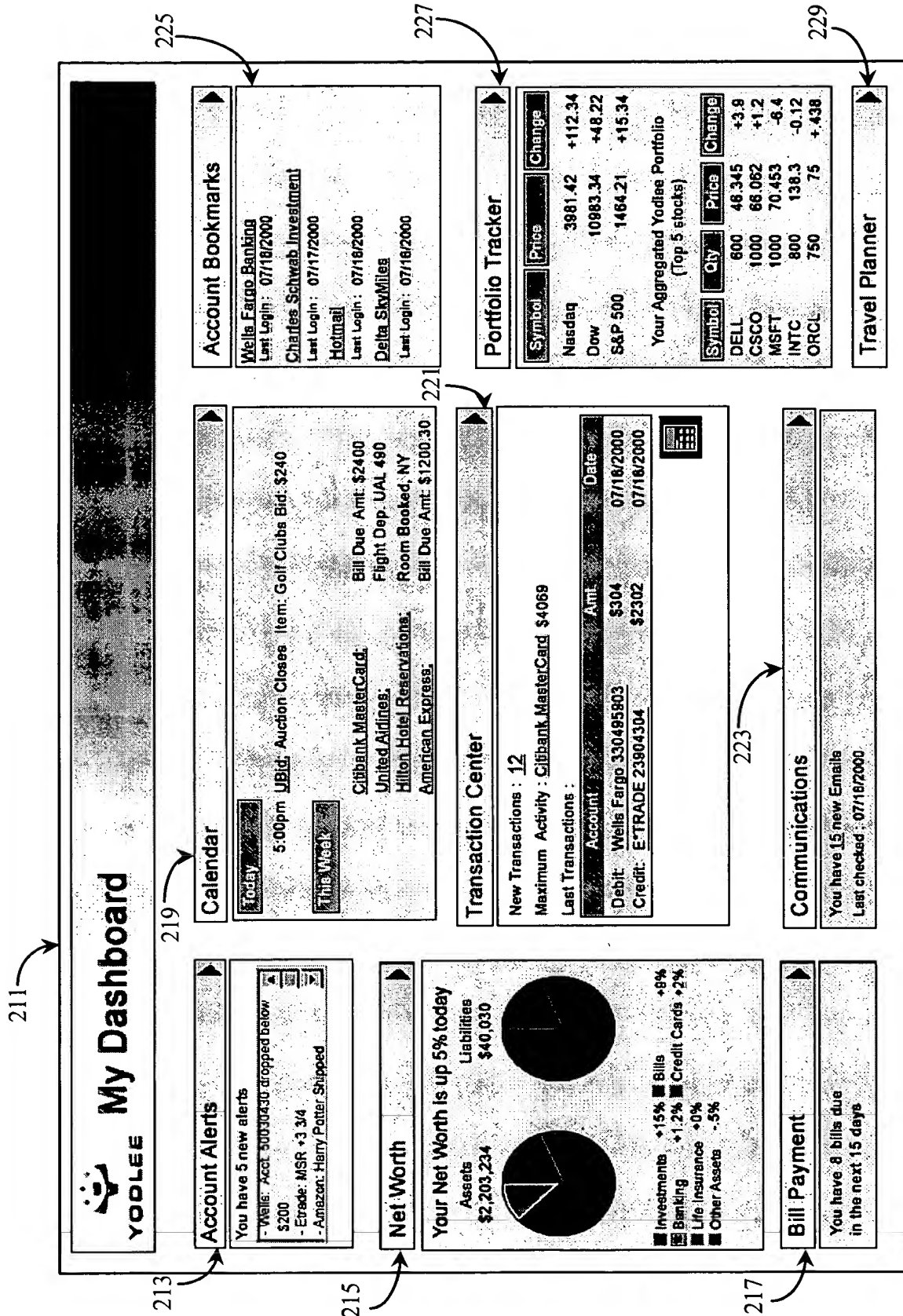


Fig. 11

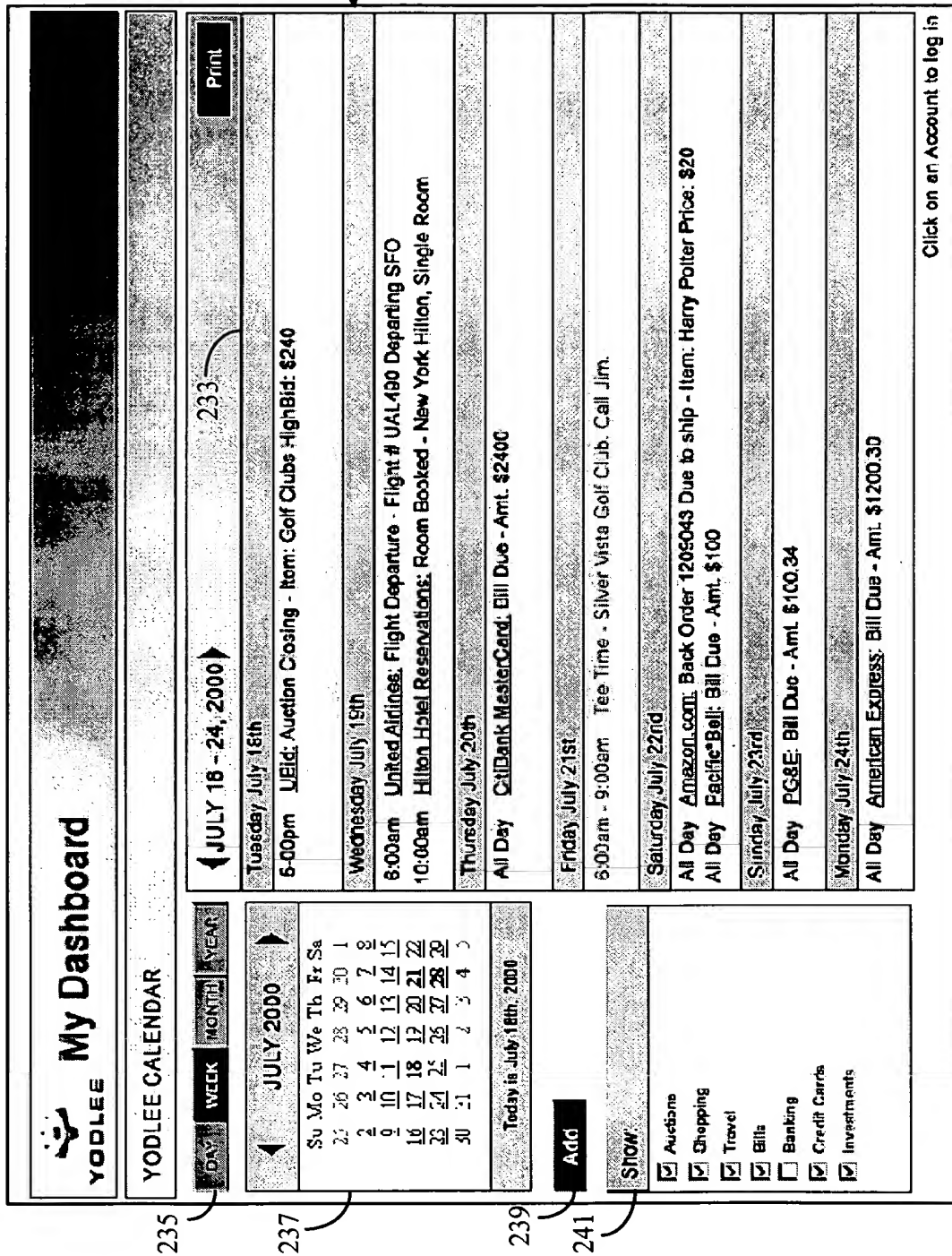



Fig. 12

700750 22245860

243

**My Dashboard**
YODLEE

TRANSACTION CENTER

Tuesday, July 18th

245

New Transaction Summary

Chase Visa Credit Card : 5 new transactions
Wells Fargo Savings : 3 new transactions
Wells Fargo Checking : 2 new transactions
E*TRADE : 2 new transactions

249

Select an Account:

247

Chase Visa Credit

251

Delete

Archive

Date	Description	Amount	Category	Delete	Email CPA
07/14/2000	Pizza Hut, San Jose CA	\$34.12	Dining Out	<input checked="" type="checkbox"/>	<input type="checkbox"/>
07/15/2000	AT&T Wireless, CA	\$19.99	Utilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
07/16/2000	BEST BUY, Redwood City, CA	\$340.23	Home	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
07/17/2000	Honda City, San Jose, CA	\$72.54	Auto	<input checked="" type="checkbox"/>	<input type="checkbox"/>
07/18/2000	Barnes and Noble, San Jose CA	\$13.02	Misc.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Email My CPA

253

View History

255

Bill Payment

Fig. 13

257

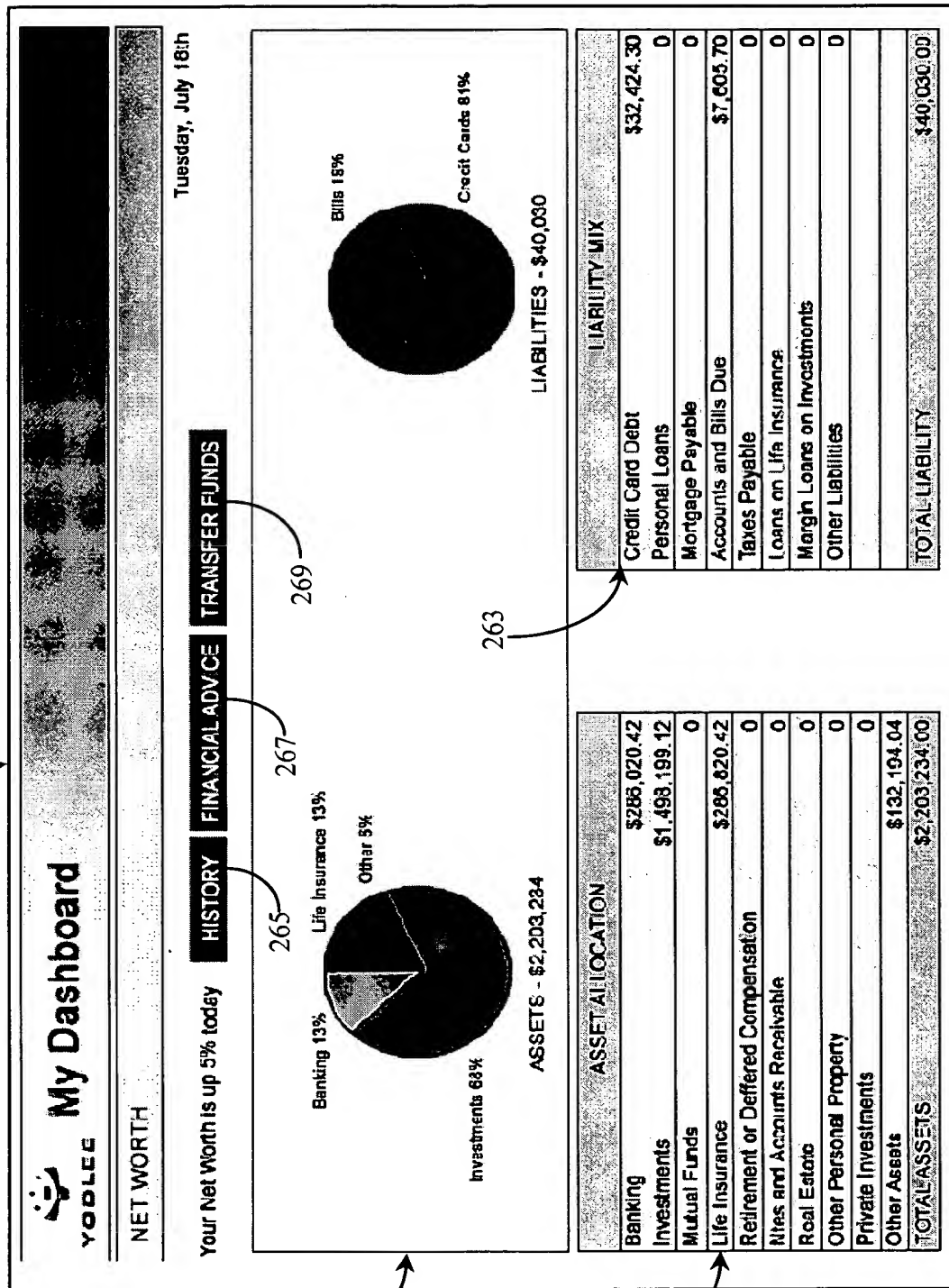
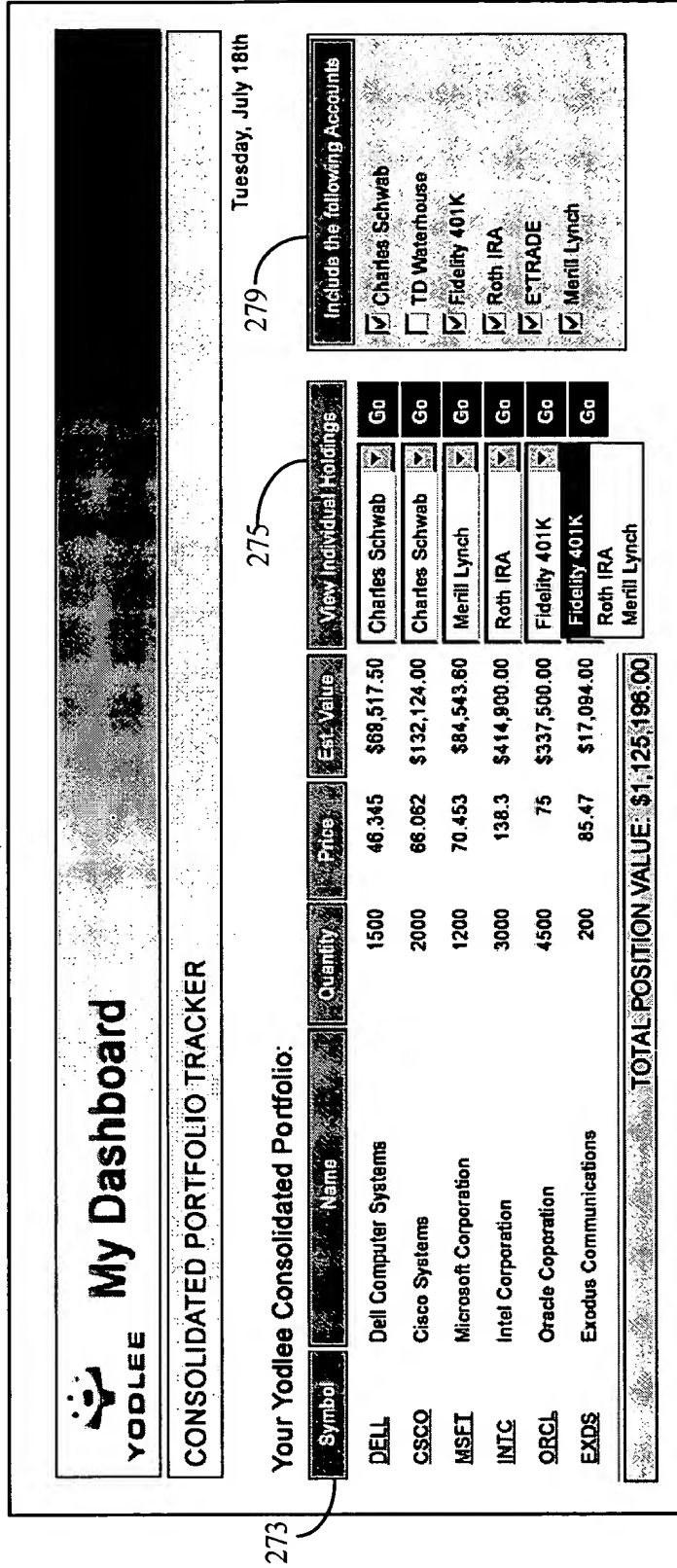


Fig. 14

400T50 224560

271 →



279

275

273 →

Fig. 15

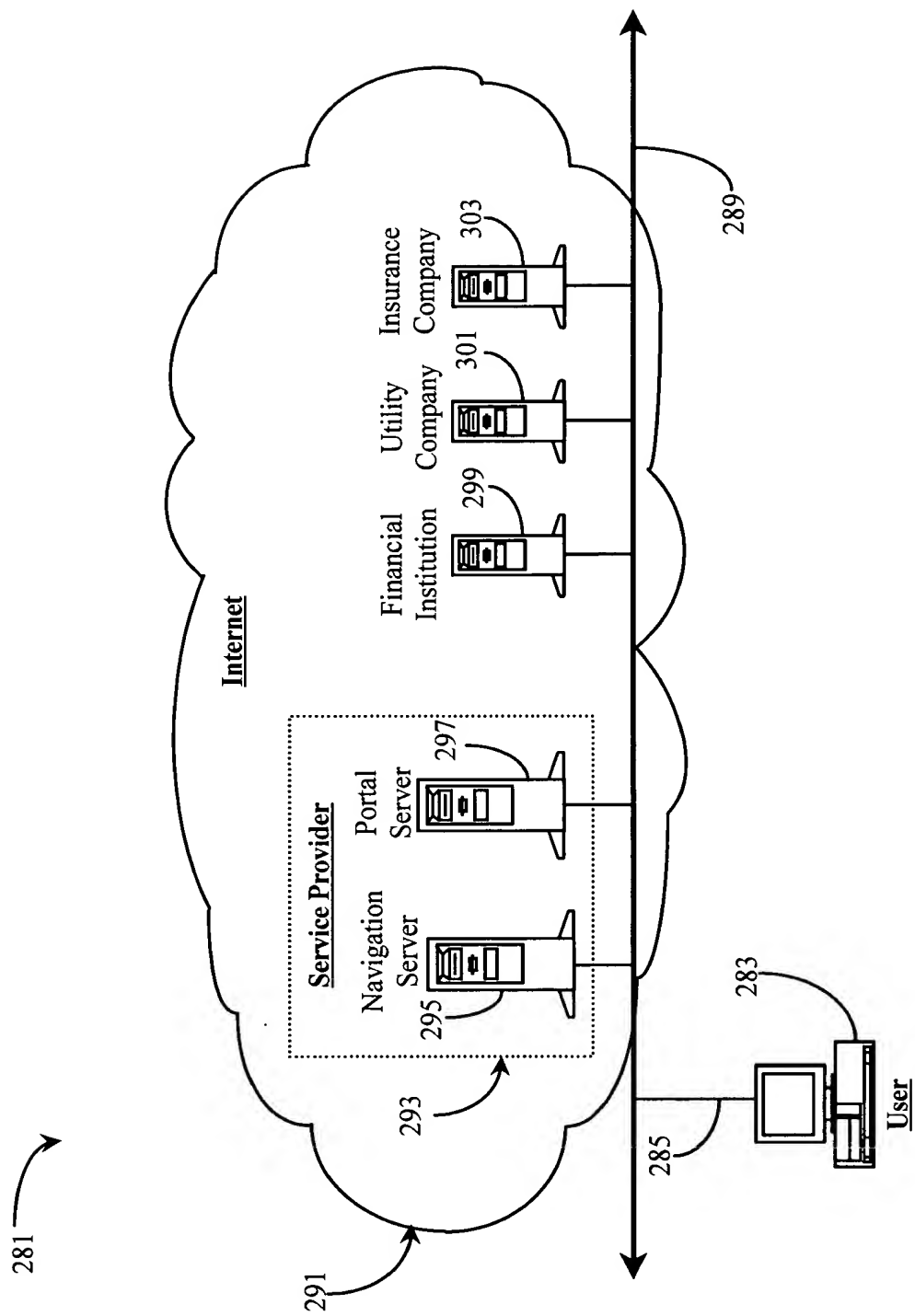
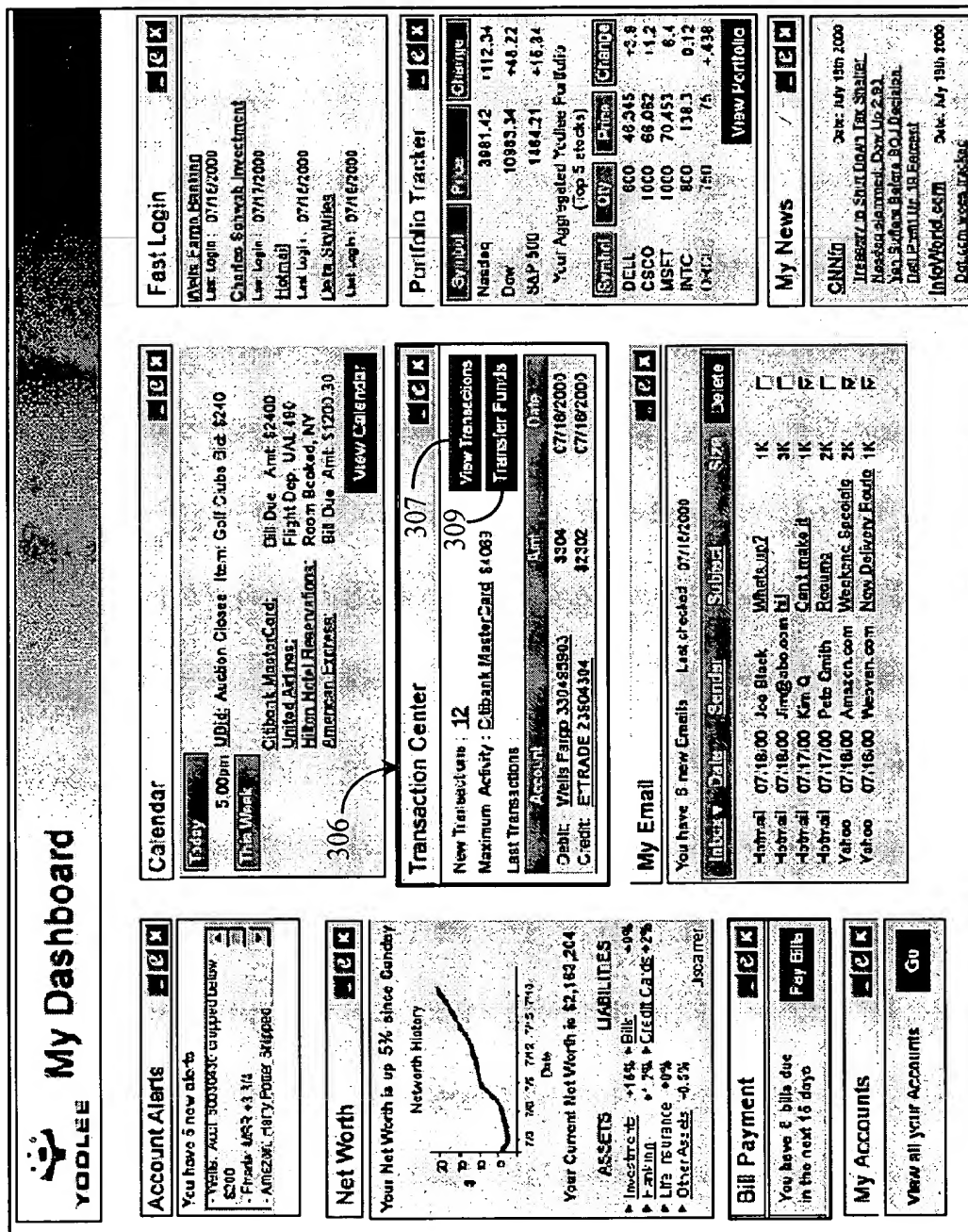


Fig. 16



700750-224530

Transaction Center - Default View

TRANSACTION CENTER

New Transaction Summary

All Accounts: 12 new transactions

Chase Visa Credit Card : 5 new transactions

Wells Fargo Savings : 3 new transactions

Wells Fargo Checking : 2 new transactions

E-TRADE : 2 new transactions

New Transactions: All Accounts

Date	Description	Account	Amount	Category
07/14/2000	Pizza Hut, San Jose CA	Chase Visa Credit Card	\$34.12	Food and Beverage
07/15/2000	AT&T Wireless, CA	Wells Fargo Savings	\$19.99	Utilities
07/16/2000	BEST BUY, Redwood City	Wells Fargo Checking	\$340.23	Home
07/17/2000	Honda City, San Jose, CA	Wells Fargo Checking	\$72.54	Auto
07/18/2000	Pomona College, San Jose CA	E-TRADE	\$100.00	Charitable Contribution

Save Categories

Transaction History

Bill Payment

243

313

315

317

319

321

Fig. 18

Transaction Center: One Account View

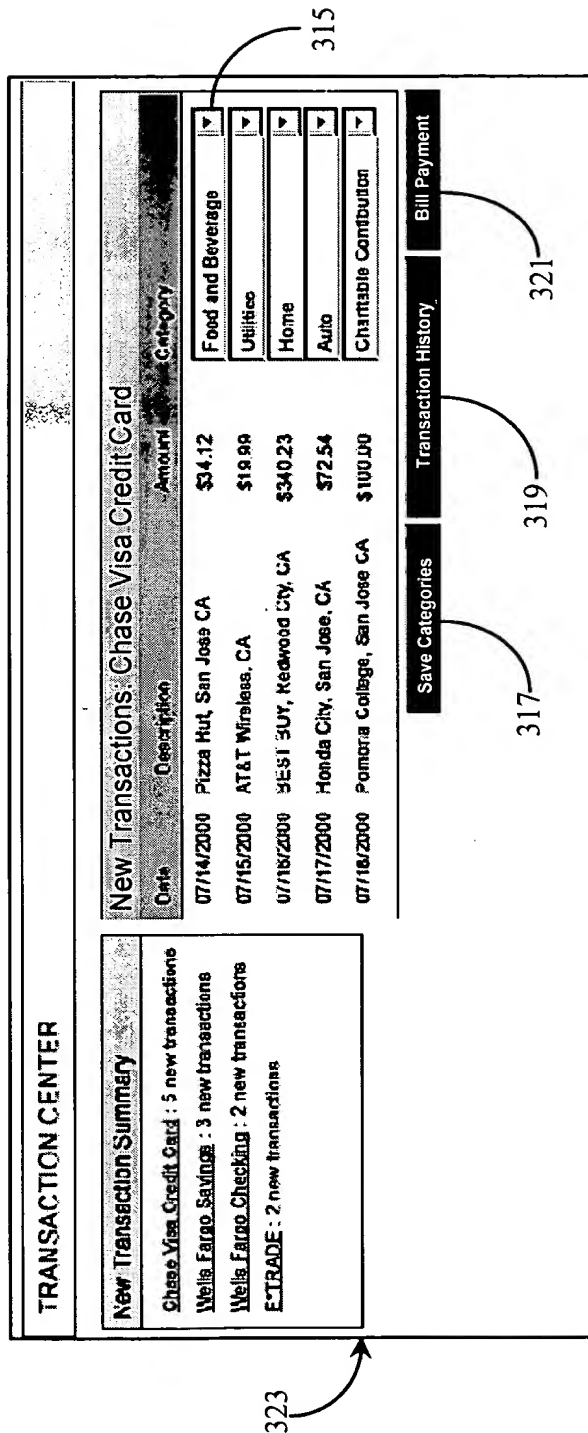


Fig. 19

FOOTNOTES

Transaction Center: Transaction History / All Accounts

TRANSACTION HISTORY

Select an Account

All Accounts

Chase Credit Card

American Express

BankOne Checking

Select a Timeframe:

YTD

This Month

Last 6 months

Last 12 months

Select a View:

Chronological

Auto

Charitable Contributions

Entertainment

Food and Beverage

329

331

Display

324

Transaction History - All Accounts

Chart it

Account

Category

Amount

Date	Description	Category	Amount
01/03/00	Payment to Bob Formichi	Housing	\$1,600.00
01/03/00	Final Final	Food and Beverage	\$27.85
01/03/00	The Fillmore	Entertainment	\$154.32
01/05/00	Brake Repair Shop	Auto	\$553.36
02/04/00	Payment to Bob Formichi	Housing	\$800.00
02/04/00	Shereline Amphitheater	Entertainment	\$88.44
03/04/00	Big O Tires	Auto	\$432.21
03/08/00	TicketMaster	Entertainment	\$145.34
03/08/00	Payment to Bob Formichi	Housing	\$800.00
04/07/00	Clementines	Food and Beverage	\$167.67
04/15/00	American Heart Association	Charitable Contributions	\$200.00
04/31/00	Great American Music Hall	Entertainment	\$198.20
04/31/00	Payment to Bob Formichi	Housing	\$800.00
Expenses			\$6,067.39

Previous

Next

Edit Categories

Fig. 20

Transaction Center: Transaction History / All Accounts - By Category; YTD

TRANSACTION HISTORY

Select an Account:

All Accounts

Chase Credit Card

American Express

BankOne Checking

Select a Timeframe:

YTD

This Month

Last 6 months

Last 12 months

Select a View:

By Category

Chronological

Auto

Charitable Contributions

Entertainment

Food and Beverage

Display

Transaction History - All Accounts

Date	Description	Category	Amount
01/05/00	Brake Repair Shop	Auto	\$553.36
03/04/00	Big O Tires	Auto	\$432.21
Auto Total			\$985.75
02/05/00	Pomona College	Charitable Contributions	\$100.00
04/15/00	American Heart Association	Charitable Contributions	\$200.00
Charitable Contributions Total			\$300.00
01/03/00	The Fillmore	Entertainment	\$154.32
02/04/00	Shoreline Amphitheater	Entertainment	\$88.44
03/08/00	TicketMaster	Entertainment	\$145.34
04/31/00	Great American Music Hall	Entertainment	\$198.20
Entertainment Total			\$586.30
01/03/00	Final Final	Food and Beverage	\$27.85
04/07/00	Clementine	Food and Beverage	\$167.67
Food and Beverage Total			\$195.52
01/03/00	Payment to Bob Formichi	Housing	\$1,600.00
02/04/00	Payment to Bob Formichi	Housing	\$800.00
03/08/00	Payment to Bob Formichi	Housing	\$800.00
04/31/00	Payment to Bob Formichi	Housing	\$800.00
Housing Total			\$4,000.00
Expenses YTD			\$6,067.39

Edit Categories

Fig. 21

Transaction Center: Transaction History / Bar Graph

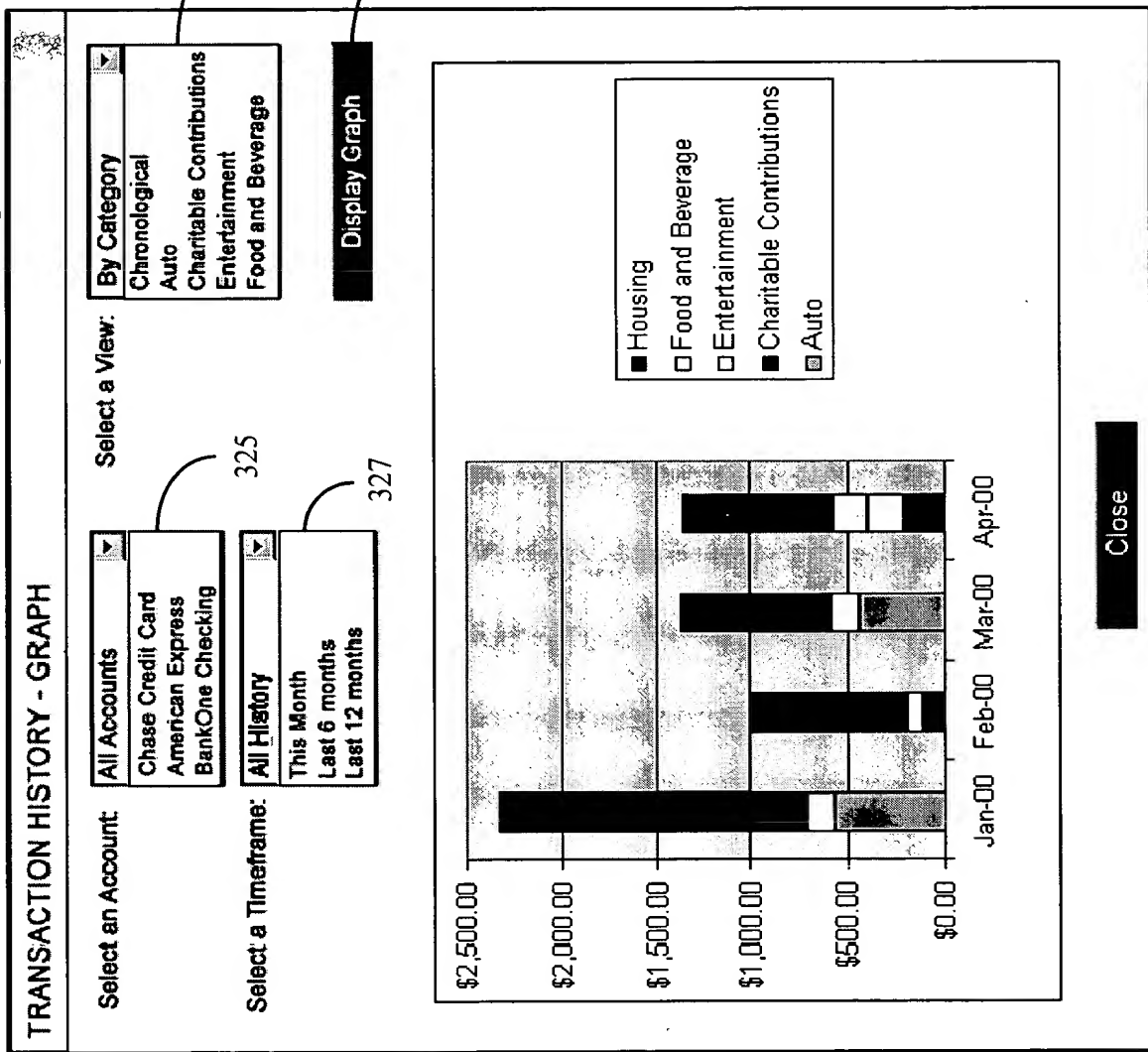


Fig. 22

Transaction Center: Transaction History / Line Graph

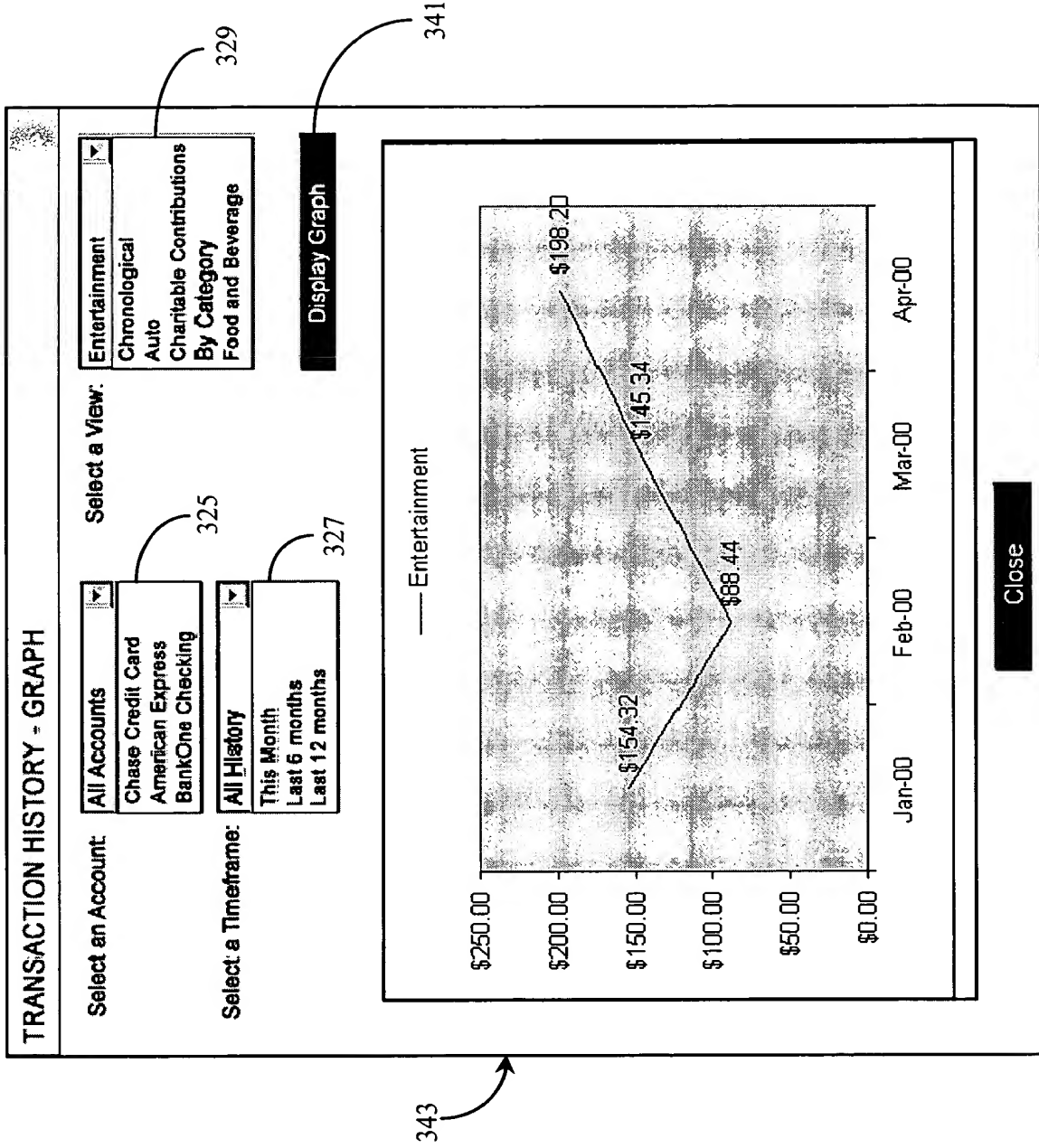


Fig. 23

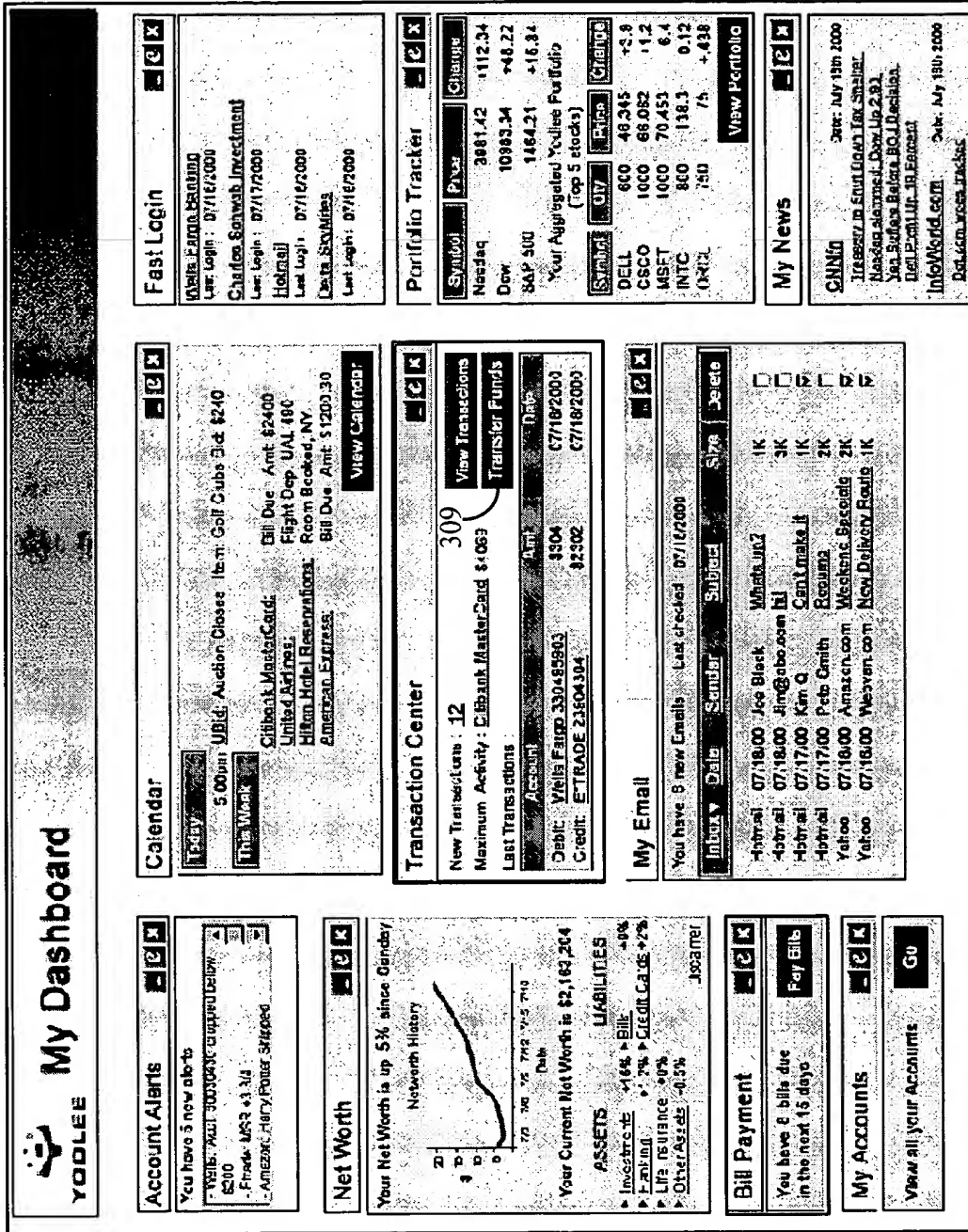


Fig. 24

Transfer Funds

TRANSFER: \$500

ON: 09/20/00

FROM:

Wells Fargo Banking - 1234567-xxx
BankOne - 238036798
E-TRADE - 98765-43xx
Wells Fargo Banking - 1234567-xxx
Wells Fargo Banking - 7074343-xxx

TO:

BankOne - 238036798
BankOne - 238036798
E-TRADE - 98765-43xx
Wells Fargo Banking - 1234567-xxx
Wells Fargo Banking - 7074343-xxx

Add a New Account

Cancel

Transfer Funds

Pending Transfers

Transfer Date	From	To	Amount
09/03/00	Wells Fargo Banking 123456780-xxx	E-TRADE 987654321-xxx	\$5000.00

Inquire

Least 10 Transactions

Date	Status	From Account	Payee	Amount
08/18/00	Pending	Wells Fargo Banking	Funds Transfer to E-TRADE	\$5000.00
08/12/00	Complete	Fidelity MMA	Landlord	\$1,500.00
08/11/00	Complete	Wells Fargo Checking	AT&T	\$32.87
08/11/00	Complete	Wells Fargo Checking	PacBell	\$33.06
08/10/00	Complete	PayPal	John Smith	\$100.00
08/10/00	Complete	Fidelity MMA	State Farm Insurance	\$240.00
08/04/00	Complete	Prudential	Funds Transfer to E-TRADE	\$1,000.00
08/05/00	Complete	E-TRADE	Funds Transfer to BankOne	\$500.00
08/02/00	Rejected	PayPal	Patty Neal	\$32.15
08/02/00	NSF	ChitBank Mastercard	ChitBank Checking	\$1,032.10

More Transactions

Active Balance

Wells Fargo Banking - 1234567-xxx

Current Balance:	\$3,000.25
Wells Fargo Mastercard:	(\$2,400.00)
Final Balance:	\$600.25

BankOne - 238036798

Current Balance:	\$2,204.21
American Express:	(\$1,000.00)
Final Balance:	\$1,204.21

View Balances

Fig. 25

Edit Account List

Edit Account Lists

☐ American Express - 3333-3333-3333-xxxx

☐ BankOne - 12333-33xxxx

☐ Chase Mastercard - 1234-4567-3456-xxxx

☐ Fidelity Investments - T9999-3333

☐ Wells Fargo Banking - 12345678-xxx

OK

Cancel

359



Fig. 26

Account Information

ACCOUNT INFORMATION

We need some additional information to complete this transaction

Enter your complete Wells Fargo Account Number

1234567-888

Enter your complete BankOne Account Number

9878988-xxx

Enter your BankOne Routing Number
(this is the 9 digit number on the bottom of your check)

OK

Cancel

361

Fig. 27

Account Information - Confirmation

TRANSFER CONFIRMATION

You have requested the following transaction

Transfer	\$500	from	Wells Fargo Banking - 1234567-888
		to	BankOne - 2398038798
		Routing #	987987987
		on	09/20/00

Please confirm these fund transfer details :

OK

Edit

Cancel

363

Fig. 28